SEWUP

Statewide Educational Wrap Up Program

OCIP Tools Online

Contractor User Guide

General | Contractor/Contract | Screens/Enrollment/Payroll Entry | Smart View/Reports

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CONTRACTOR USER GUIDE OVERVIEW

VUE WRAP-UP Management's Contractor Portal is a suite of software components that provides you with the ability to complete your on-line enrollment process and report your payroll with ease in a user-friendly manner.

Our intent is to ensure that after reading this quick reference guide you will be able login into VUE WRAP-UP Management and work with the various screens to take full advantage of On-line Enrollment, Payroll Reporting Options, Report Viewing, and Certificate Management.

GETTING STARTED – LOGGING INTO VUE WRAP-UP MANAGEMENT

Double click on Web Browser shortcut icon on your desktop and enter the VUE WRAP-UP Management URL: **https://vue.keenan.com**. This will open the VUE Wrap-Up Management login screen.

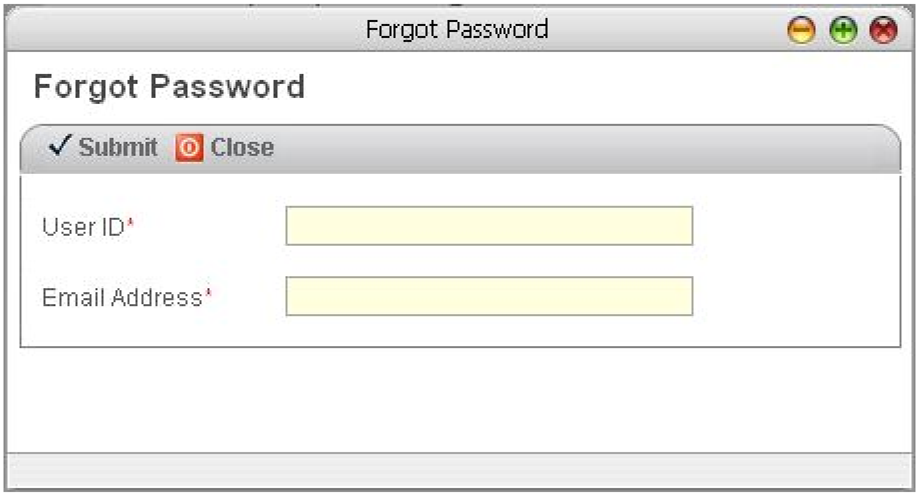
Enter the following:

Login	Enter assigned VUE Wrap-Up Management User ID.
Password	Enter the user password.

FORGOT PASSWORD INSTRUCTIONS

Please click on the “Forgot Password” link and enter your User ID and Email Address, then click the Submit button. Your password will then be sent immediately to the Email address you have specified.

Note: If you forget your User ID, please contact SEWUP Administration @ 1-800-654-8102.



REGISTER ME INSTRUCTIONS

This application is provided for Contractor Portal Users. You may register from the screen below to obtain your User ID and Password to access VUE WRAP-UP Management.

Please click 'Register Me' link on the Login screen:

- Enter valid Contact Name and Federal ID. (Exactly the same as provided to SEWUP Administration)
- Enter valid Email Address. User ID/Login ID & Password details will be sent to this Email Address.
- Click on Submit button. If the Federal ID is correct, then the message will be displayed as "Registered Successfully". An Email will then be been sent to your Email Address as a confirmation of registration. A second e-mail containing your User ID and Password will be sent within 24 hours.
- Click on Ok button.
- Click on Close button to close the screen.
- If the Federal ID entered is incorrect, then the message will be displayed as "Error Occurred: Federal ID is Incorrect".

CHANGE PASSWORD INSTRUCTIONS

Once you log in successfully, you will be prompted to change your password. The change password screen will be displayed as shown below.

- Please enter Old Password (Federal ID), New Password and Retype New Password.
- Click on Submit button. If data entered successfully system will display the message, "Your Password has been changed successfully".
- Click on Ok button.
- Click on Close button in Change Password screen to close the screen.
- If you would like to change your password again, please click on Change Password link on the top of your Home Page to open Change Password screen.

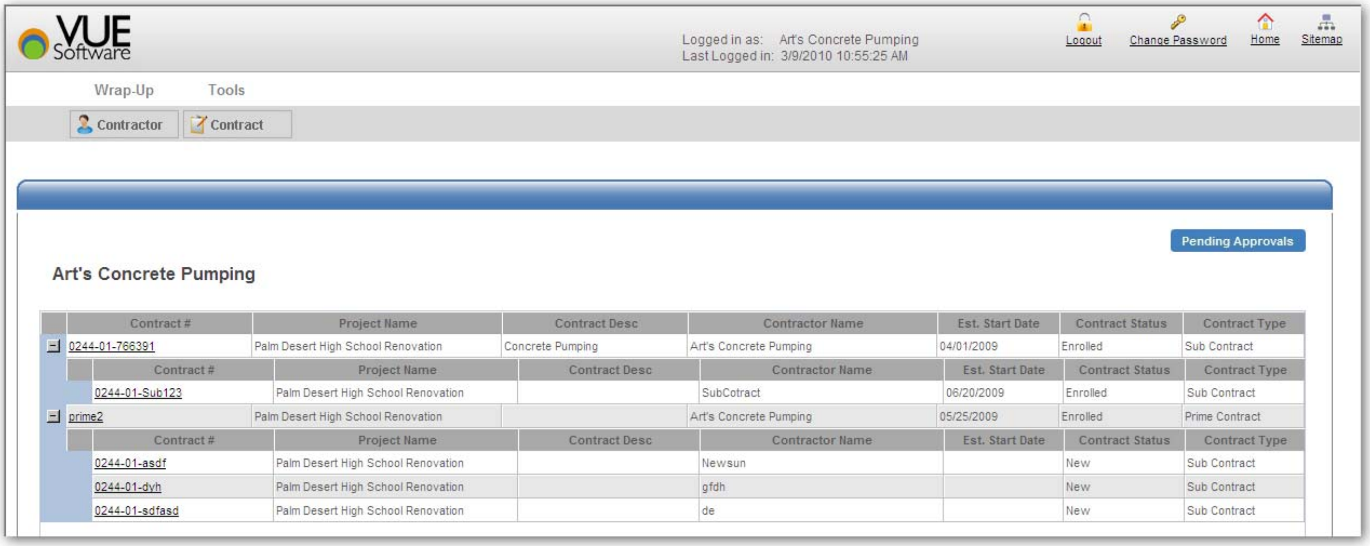
SITE MAP INSTRUCTIONS

The “Site Map” can be viewed through the link on top right hand corner of your Home Page. Click on Site Map link to open the following screen:

- In the Site Map, the Modules and their components are displayed as shown above.
- Click on required link from the Site Map to navigate to that respective component screen.
- Click on Close button to close the screen.

HOME PAGE INSTRUCTIONS

Once you log in successfully," Home Page" will be displayed by default. The list of available contracts will be shown as below.



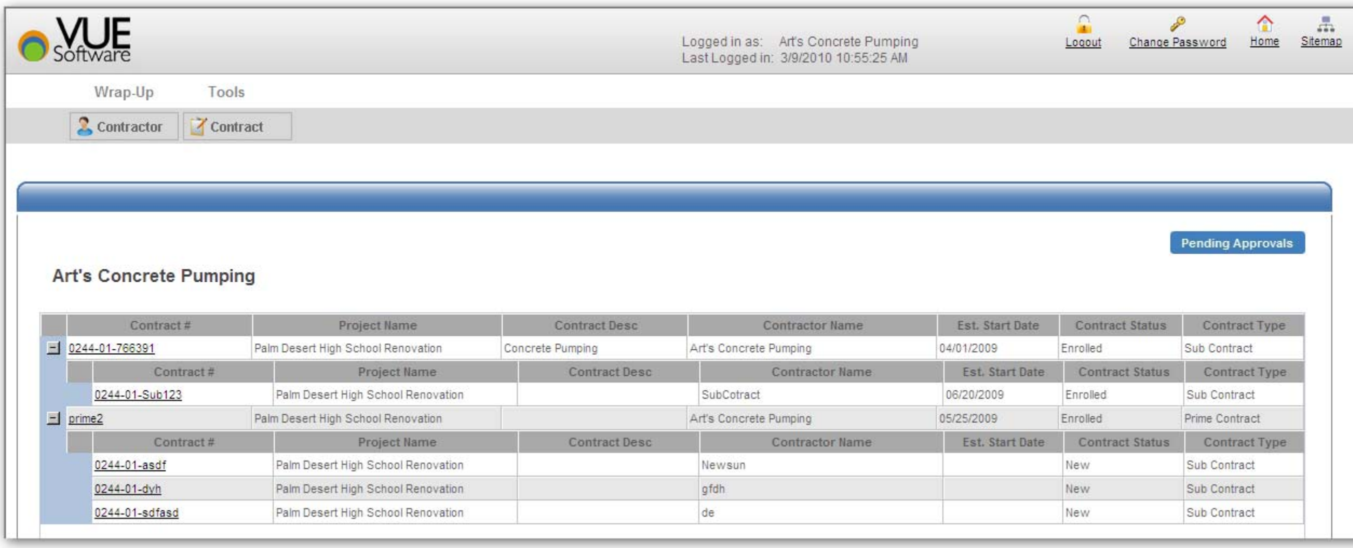
- Click on '+' button to the left hand side of Contract links to display the sub contracts under that contract.

REJECTED ENTRIES/CHANGES INSTRUCTIONS

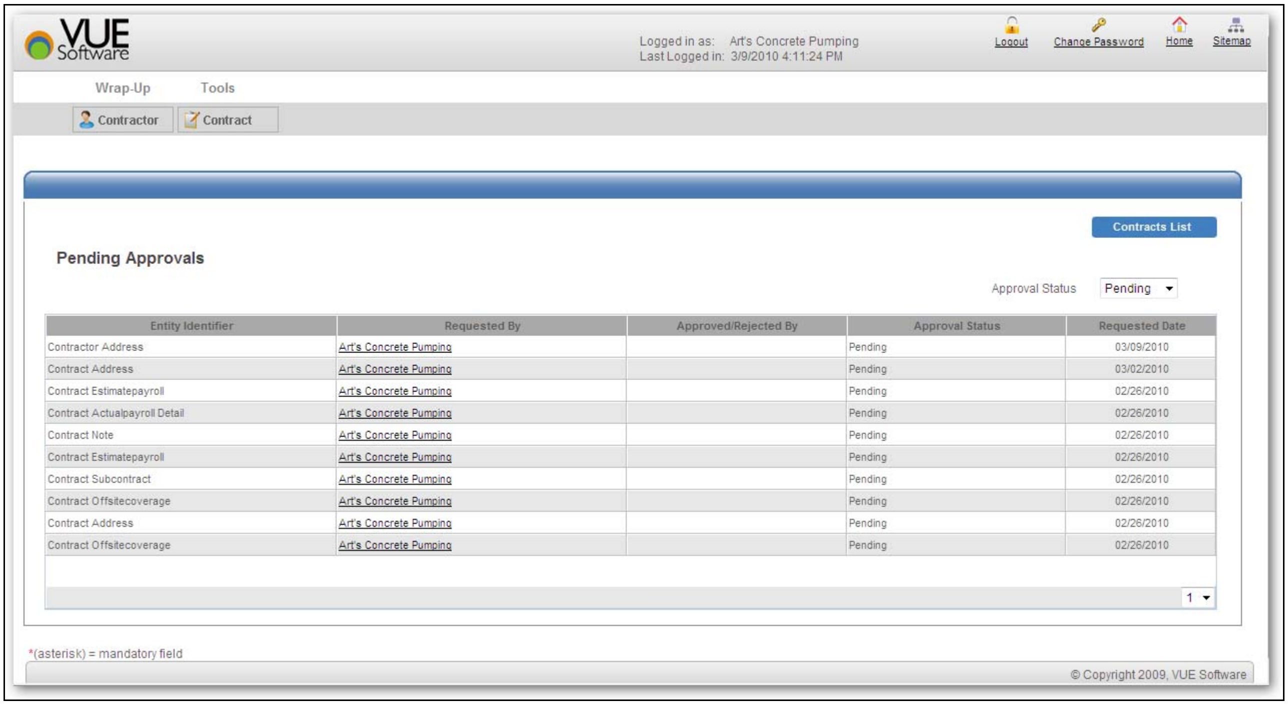
If there are any entries rejected by SEWUP Administration, the system will display a prompt as shown below.

Your Rejected/Pending/Approved entries can be seen by clicking on Pending Approvals button. Select respective 'Approval Status' from drop down menu.

- Click on Pending Approvals button on top the right hand side of the grid to display the Rejected/Pending/Approved Entries. The screen looks as below:



REJECTED ENTRIES /CHANGES INSTRUCTIONS



Entity Identifier	Requested By	Approved/Rejected By	Approval Status	Requested Date
Contractor Address	Art's Concrete Pumping		Pending	03/09/2010
Contract Address	Art's Concrete Pumping		Pending	03/02/2010
Contract Estimatepayroll	Art's Concrete Pumping		Pending	02/26/2010
Contract Actualpayroll Detail	Art's Concrete Pumping		Pending	02/26/2010
Contract Note	Art's Concrete Pumping		Pending	02/26/2010
Contract Estimatepayroll	Art's Concrete Pumping		Pending	02/26/2010
Contract Subcontract	Art's Concrete Pumping		Pending	02/26/2010
Contract Offsitecoverage	Art's Concrete Pumping		Pending	02/26/2010
Contract Address	Art's Concrete Pumping		Pending	02/26/2010
Contract Offsitecoverage	Art's Concrete Pumping		Pending	02/26/2010

- Select the 'Approval Status' drop down to view 'Pending', 'Approved' or 'Rejected' entries.
- The records displayed here are the entries made by the Contractor User for the editable grids in Contractor Portal. 'Pending' entries shall be reviewed by SEWUP Administration user.
- By default, the entries made will be in 'Pending' status. SEWUP Administration will approve or reject entries.
- Once a record is 'Approved' or 'Rejected' by SEWUP Administration the action cannot be revoked. You will need to review the respective rejected change/entry reason given by SEWUP Administration, which is outlined in Contract Notes screen.
- Contractor User can go back to the contracts list by clicking on Contracts List button.

CONTRACTOR SCREEN OVERVIEW

Contractor Portal consists of following modules and components.

WRAP-UP

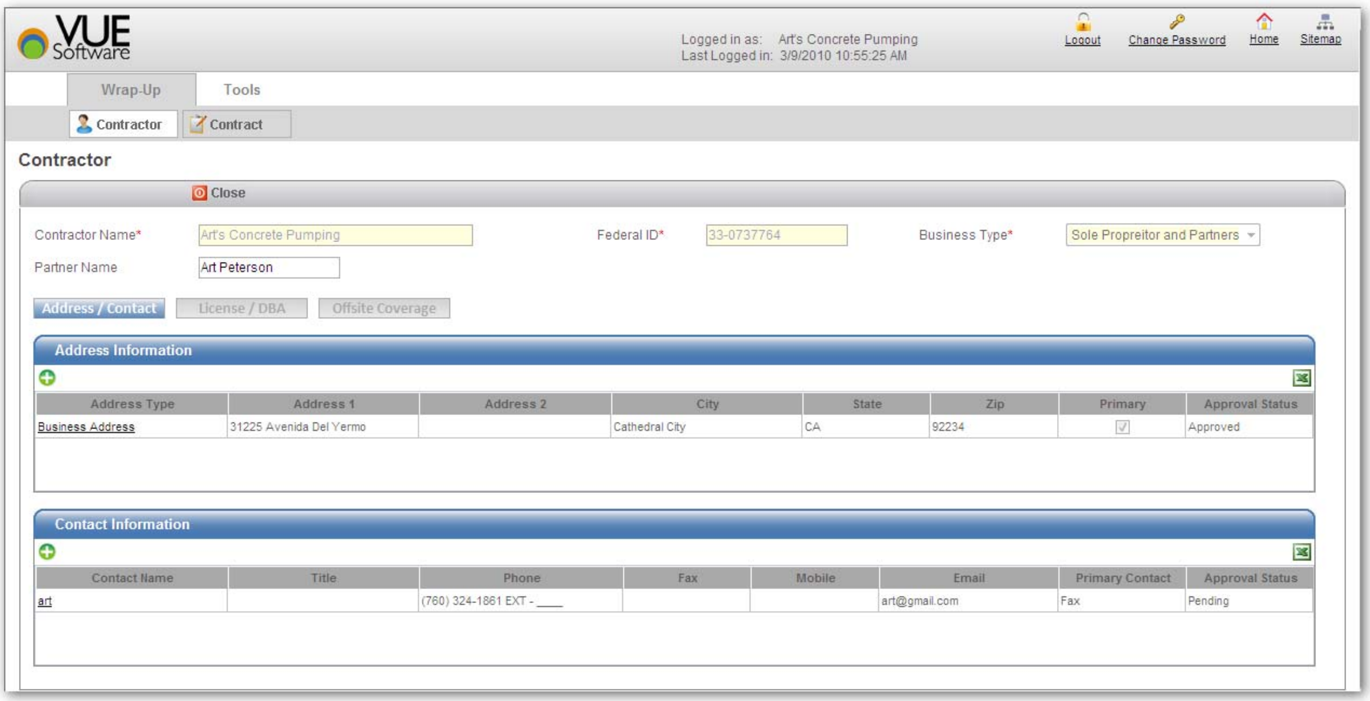
- Contractor
- Contract

Tools

- Smart View
- Reports

Contractor

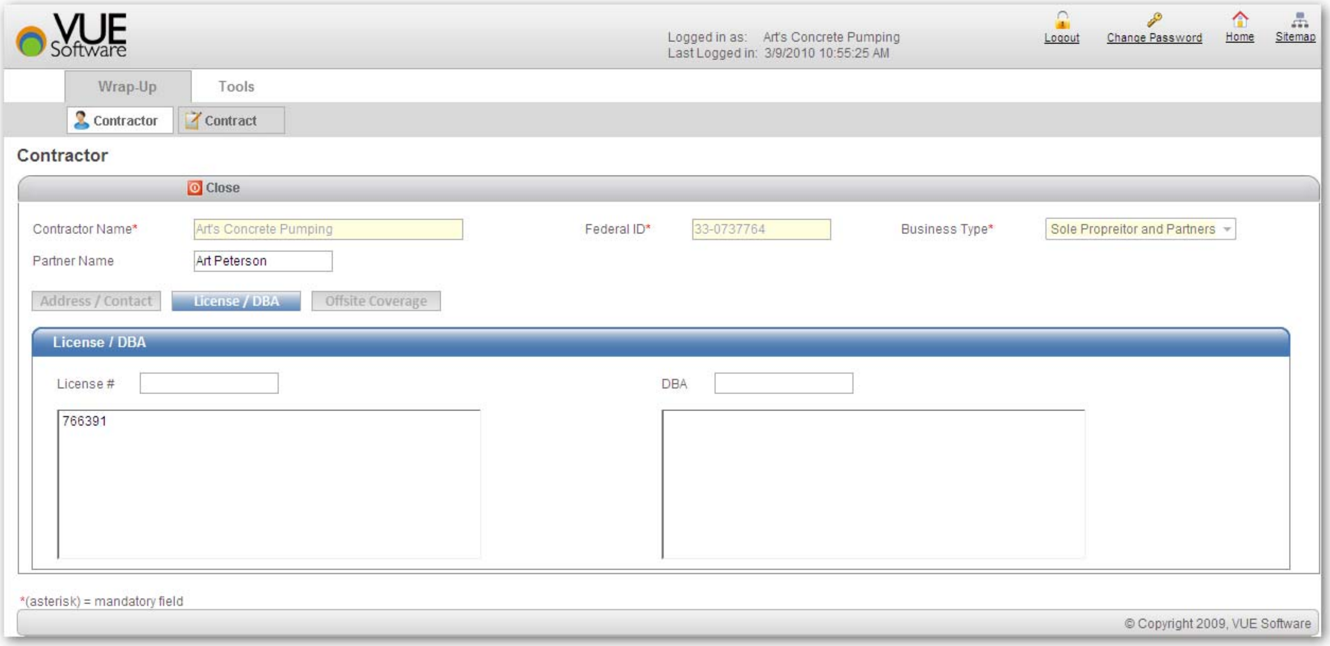
Navigation: User can navigate this screen from Wrap-Up → Contractor.



- Contractor privileges include your ability to view your Address/Contact Information, License/DBA information and Offsite Coverage Information in Contractor screen. Contractor name, Federal ID and Business Type for the Contractor are displayed in read only mode.
- Please note that by default, Address and Contact information will be shown.
- You can add/edit Address & Contact information. Once added, they cannot be deleted.
- The Approval Status will be displayed as 'Pending' in grid column for the record. Once SEWUP Administration approves your entry, the status will be changed to 'Approved'.

LICENSE/DBA SCREEN

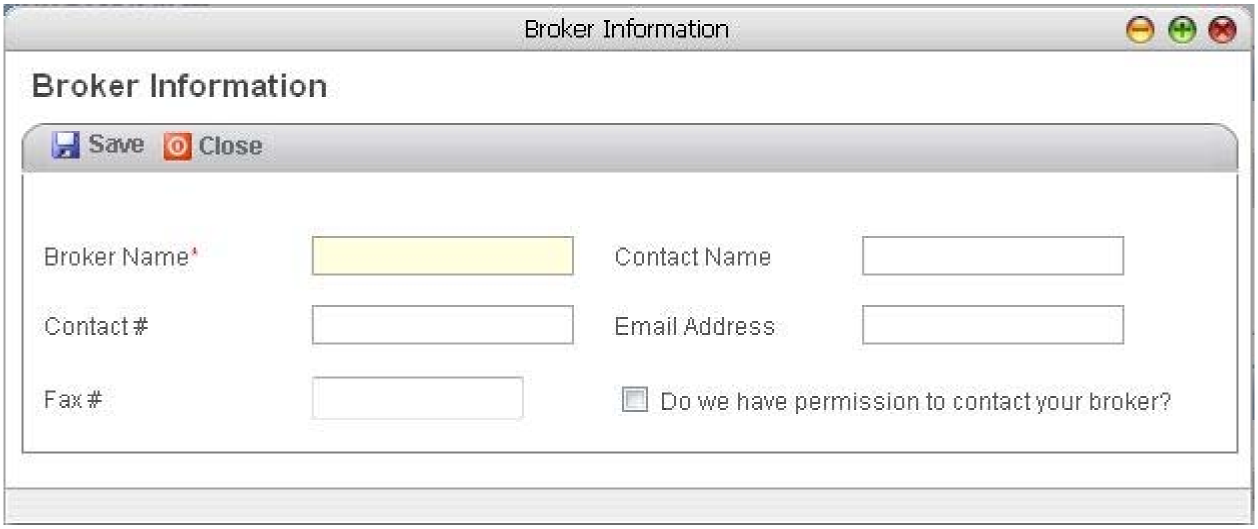
Navigation: User can navigate to this screen from Wrap-Up → Contractor → License/DBA tab.



- User can view the License # and DBA information in read only mode. Contractor cannot add/edit License & DBA.

BROKER DETAILS SCREEN

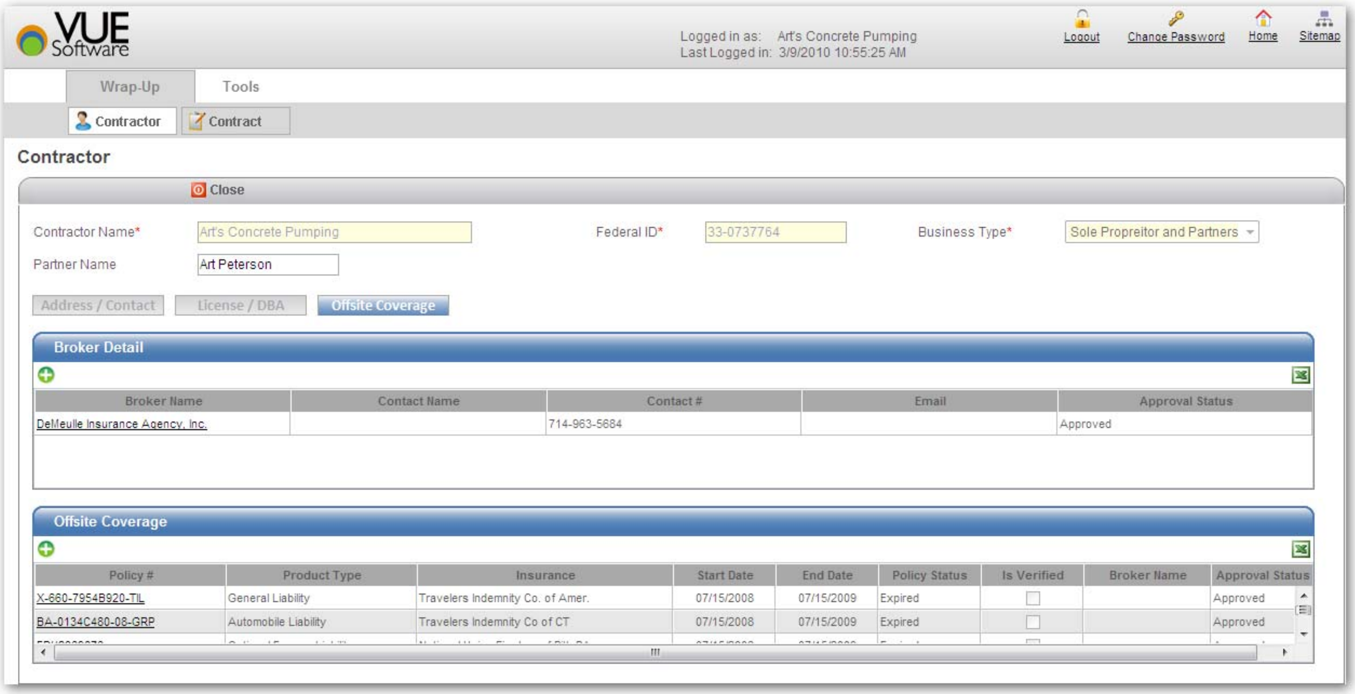
Navigation: User can navigate to this screen from Wrap-Up → Contractor → Offsite Coverage tab → Broker Detail tab.



- The Broker information for the Contractor can be added by clicking on "+" button.
- Enter the Broker Name, Contact Name, Contact # Email Address and Fax # (if available).
- If you would like to give permission to SEWUP Administration to contact your Broker, check the box next to "Do we have permission to contact your broker?"
- Click on Save button to save the Broker Information.
- Click on Close button to close the screen.
- The Approval Status will be displayed as 'Pending' in grid column for the record. Once SEWUP Administration reviews it, the status will be changed to 'Approved' or 'Rejected'.
- Once a record is 'Approved' or 'Rejected' by SEWUP Administration your submitted entry information cannot be revoked.

CONTRACTOR OFFSITE COVERAGE SCREEN

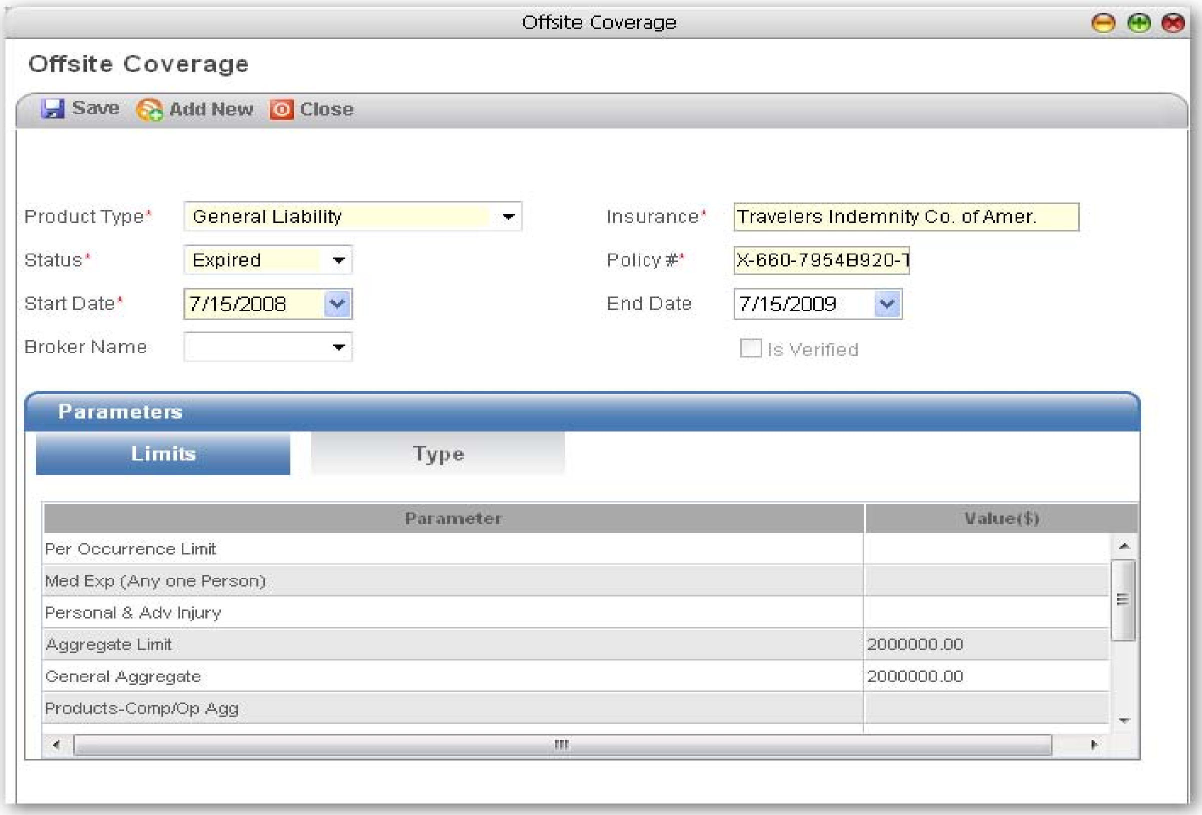
Navigation: User can navigate this screen from Wrap-Up →Contractor → Offsite Coverage tab. User can add/edit Broker and Offsite Coverage information.



- This tab will maintain the Offsite Coverage details and Broker details for the Contractor.
- To add new Broker information, click on ‘+’ button in Broker detail section.
- Select a record from Broker detail grid and click on Broker name link to display the Broker information pop up in edit mode.
- To add a new Offsite Coverage Policy, click on ‘+’ button in Offsite Coverage section.
- Select a record from Offsite Coverage grid and click on Policy # link to display the Offsite Coverage pop up in edit mode.

CONTRACTOR OFFSITE COVERAGE DETAIL SCREEN

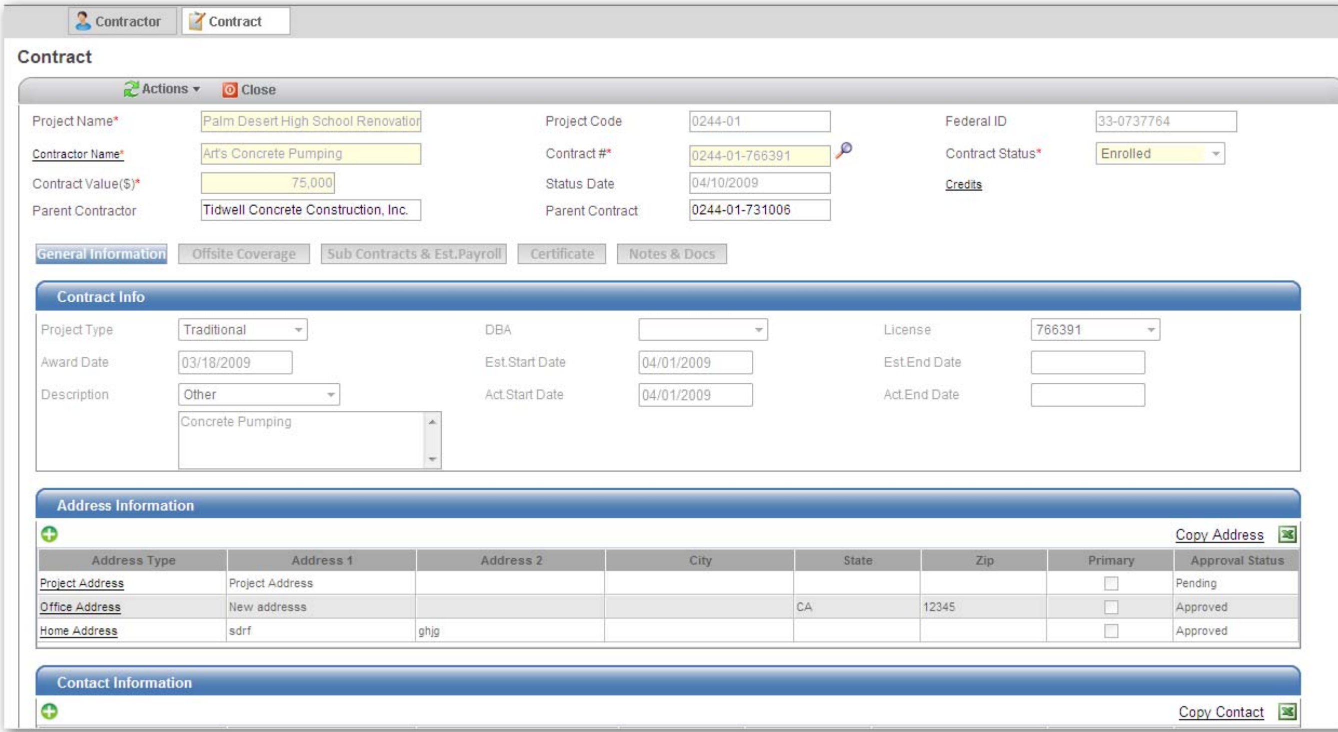
Navigation: User can navigate to this screen from Wrap-Up → Contractor → Offsite Coverage tab → Offsite Coverage Tab.



- Offsite Primary Insurance Policies for a Contractor can be added by clicking on "+" button.
- Offsite Coverage parameters are displayed in two tabs namely, Limit parameters tab and Type parameters tab.
- Select the Product Type, Insurance Company, Status and Broker name.
- Enter Policy #, Start date and End date.
- For applicable Limit parameters, enter the Value ($). For Type parameters, select the appropriate value from drop down menu, if applicable.
- Click on Save button to save the Offsite Coverage. (On saving, these policies will be added in the Offsite Coverages tab grid of Contractor screen).
- Click on Close button to close the screen. Repeat steps above to add another off-site coverage.
- The Approval Status will be displayed as 'Pending' in grid column for the record.
- Once a record is 'Approved' or 'Rejected' by SEWUP Administration, it cannot be revoked.

CONTRACT SCREEN

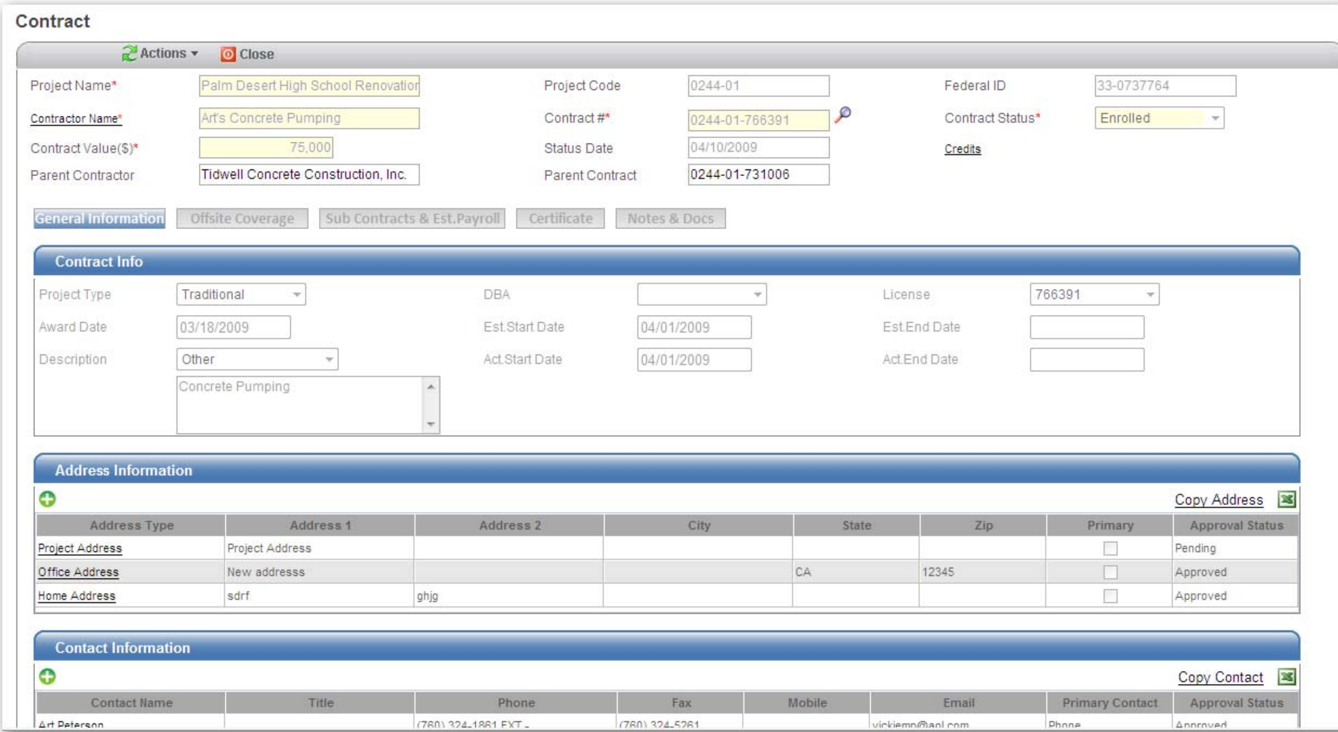
Navigation: User can navigate to this screen from Home → Contract # link or by Wrap-Up → Contract.



- In the Contracts grid of the Home Page click on the required Contract # to open the Contract screen as displayed above.
- The Contract screen consists of five tabs namely, General Information, Offsite Coverage, Sub Contracts & Est. Payroll, Certificate and Notes & Docs.
- By default, General Information tab is displayed.
- Project Name, Project Code, Federal ID, Contractor Name, Contract #, Contract Status, Contract Value, Status Date, Parent Contractor, Parent Contract, and Credits are displayed in read only mode.
- Click on Actions menu to display Actual Payroll and Credits.
- Click on Credits link to open the Calculate Credits pop up screen.
- Click on Close button to close the screen.

GENERAL INFORMATION SCREEN

Navigation: User can navigate to this screen from Contract → General Information tab. Screen consists of three sections: Contract Info, Address Information and Contact Information.



Contract Info

- Project Type, DBA, License #, Award Date, Est. Start Date, Act. Start Date, Est. End Date, Act. End Date and Description are displayed in read only mode.

Address Information

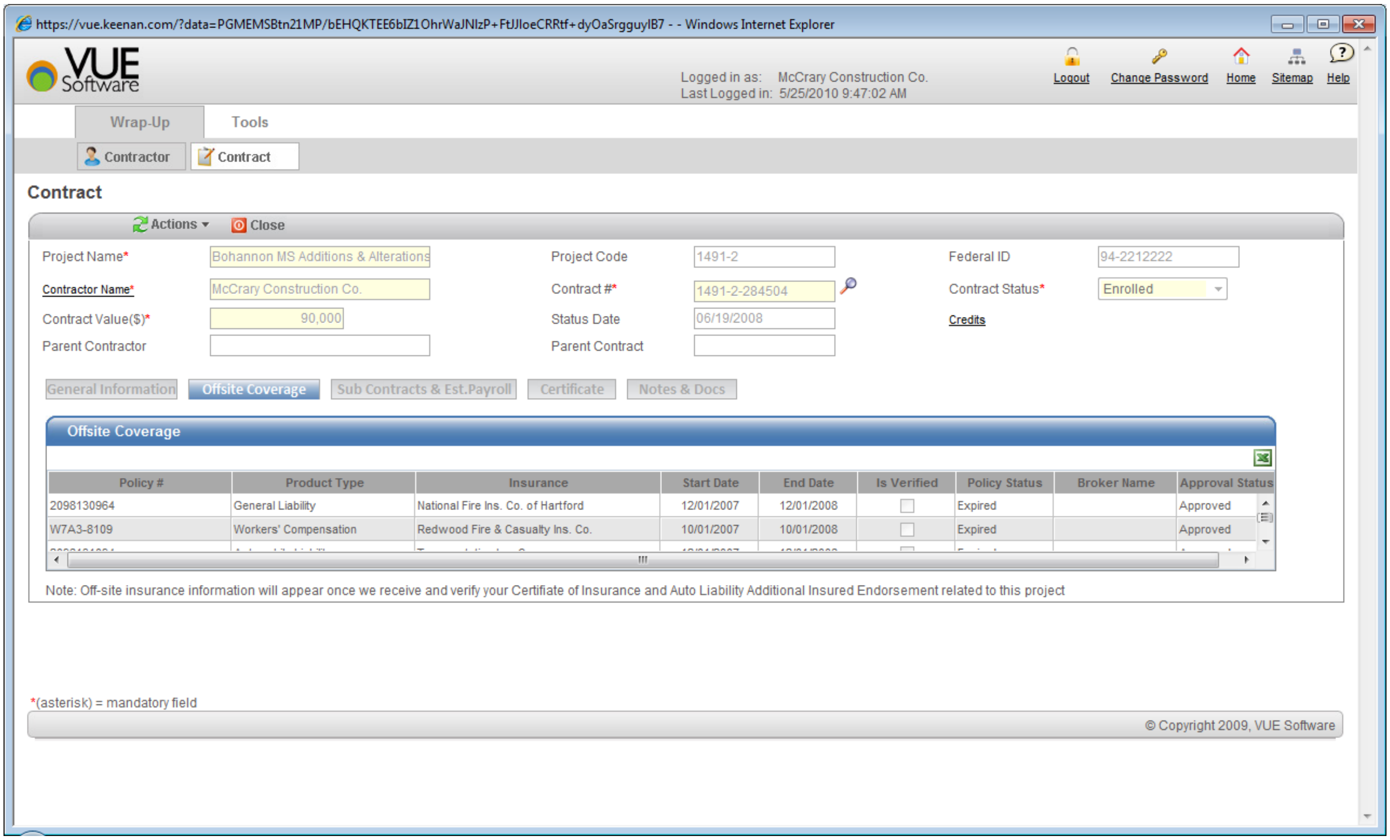
- Click on '+' button to add a new address for the Contract. Address pop up screen gets opened in add new mode.
- The Approval Status will be displayed as 'Pending' in grid column for the record.
- Select a record from the grid and click on Address Type link to open the Address pop up screen in edit mode.

Contact Information

- Click on '+' button to add a new contact for the Contract. Contact pop up screen gets opened in add new mode.
- The Approval Status will be displayed as 'Pending' in grid column for the record. Once SEWUP Administration reviews it, the status will be changed to 'Approved' or 'Rejected'.
- Select a record from the grid and click on Contact Name link to open the Contact pop up screen in edit mode.
- Once a record is 'Approved' or 'Rejected', it cannot be revoked.

CONTRACTOR OFFSITE COVERAGE SCREEN

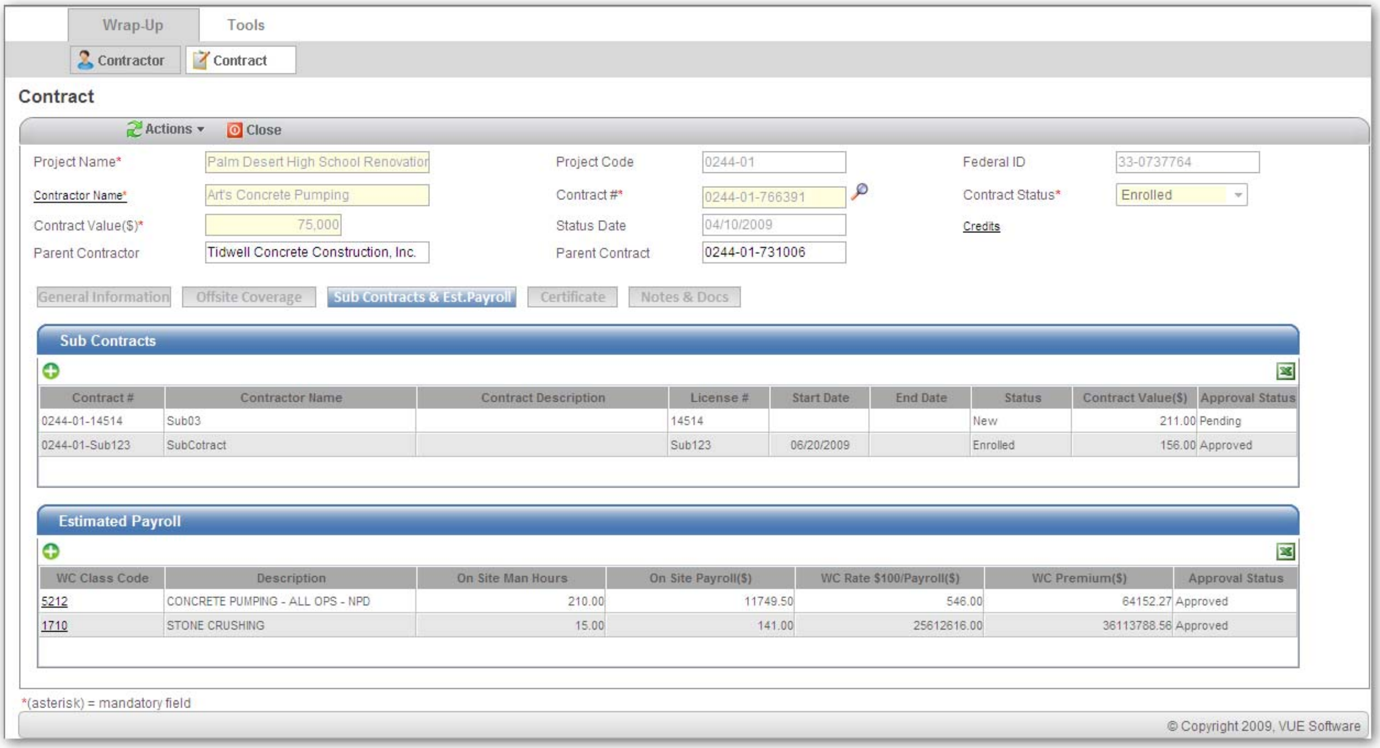
Navigation: User can navigate to this screen from Contract → Offsite Coverage Information tab.



- Offsite Coverages for the selected Contract can be viewed from this tab. This information appears as read only and is connected to the Offsite Coverage information in the Contractor Screen.
- User can click Contractor button and select the Offsite Coverage tab to edit this information.

SUB CONTRACTS & ESTIMATED PAYROLL SCREEN

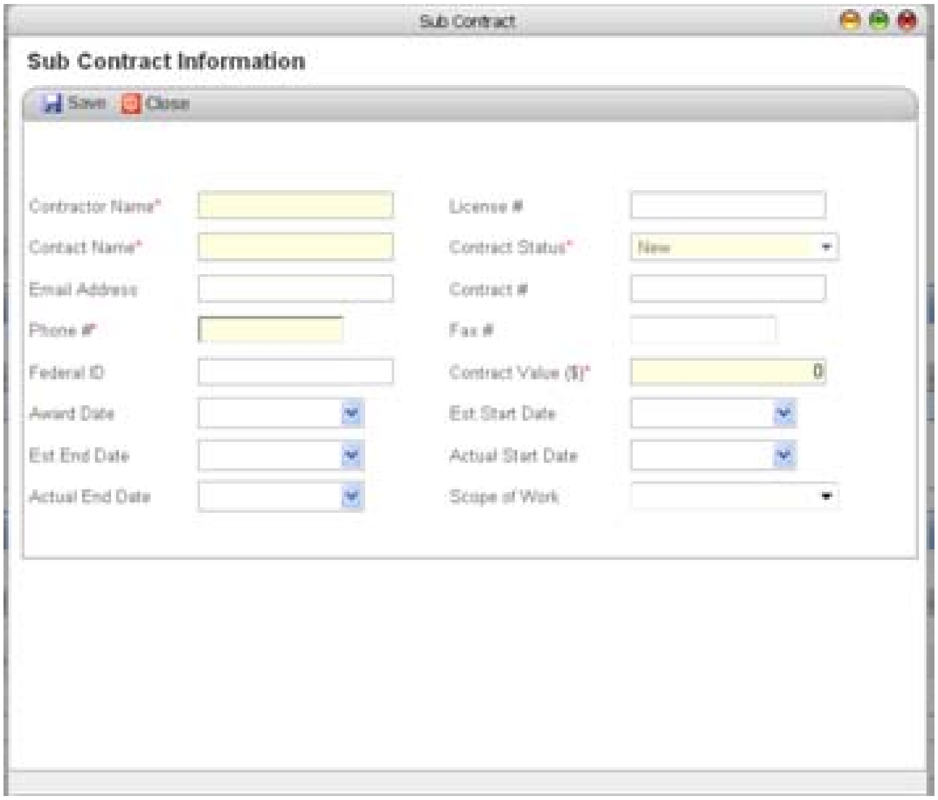
Navigation: User can navigate to this screen from Contract →Sub Contracts & Est. Payroll tab.



- Sub Contracts and Estimated Payroll information can be viewed from this tab.
- Click on '+' button to add a sub contract. Sub Contract pop up screen is opened.
- Click on '+' button to add estimated payroll. Estimated Payroll pop up screen is opened.
- Select a record from the grid and click on WC class code link to open the Estimated Payroll pop up screen in edit mode.
- After adding data, the Approval Status will be displayed as 'Pending' in grid column for the record.

SUB CONTRACTS SCREEN

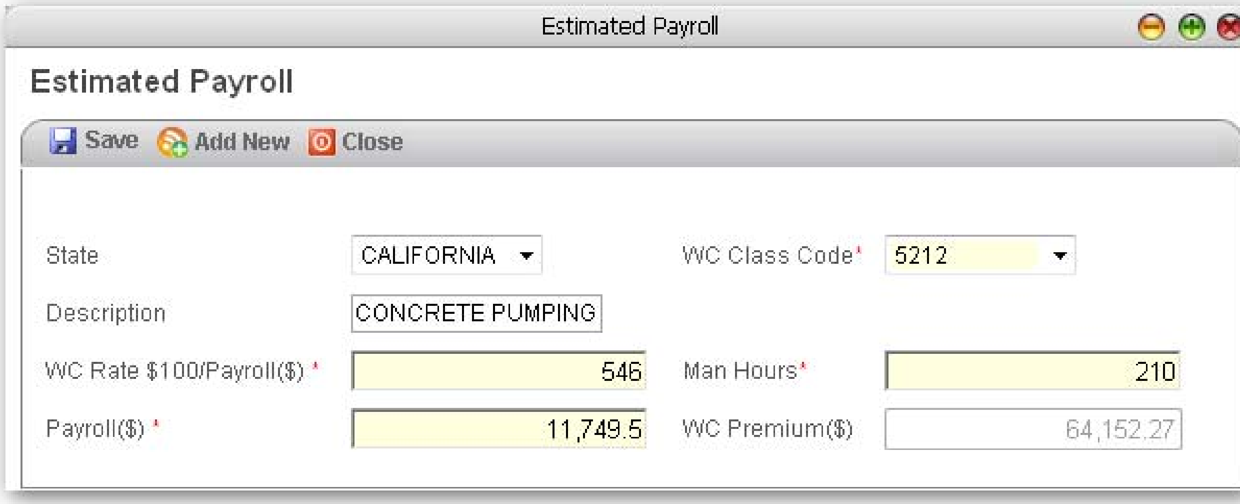
Navigation: User can navigate to this screen from Contract →Sub Contracts & Est. Payroll tab



- The above is the Sub Contract information screen that is opened in add mode.
- Enter the sub contract information. Please note that mandatory fields are identified by an asterisk.
- Click on Save button to save the sub contract information.
- Click on Close button to close the screen. Repeat steps above to add another sub contract.
- Saved Sub Contractor information will be in ‘Pending’ status until SEWUP Administration reviews it and approves or rejects the entries.

ESTIMATED PAYROLL SCREEN

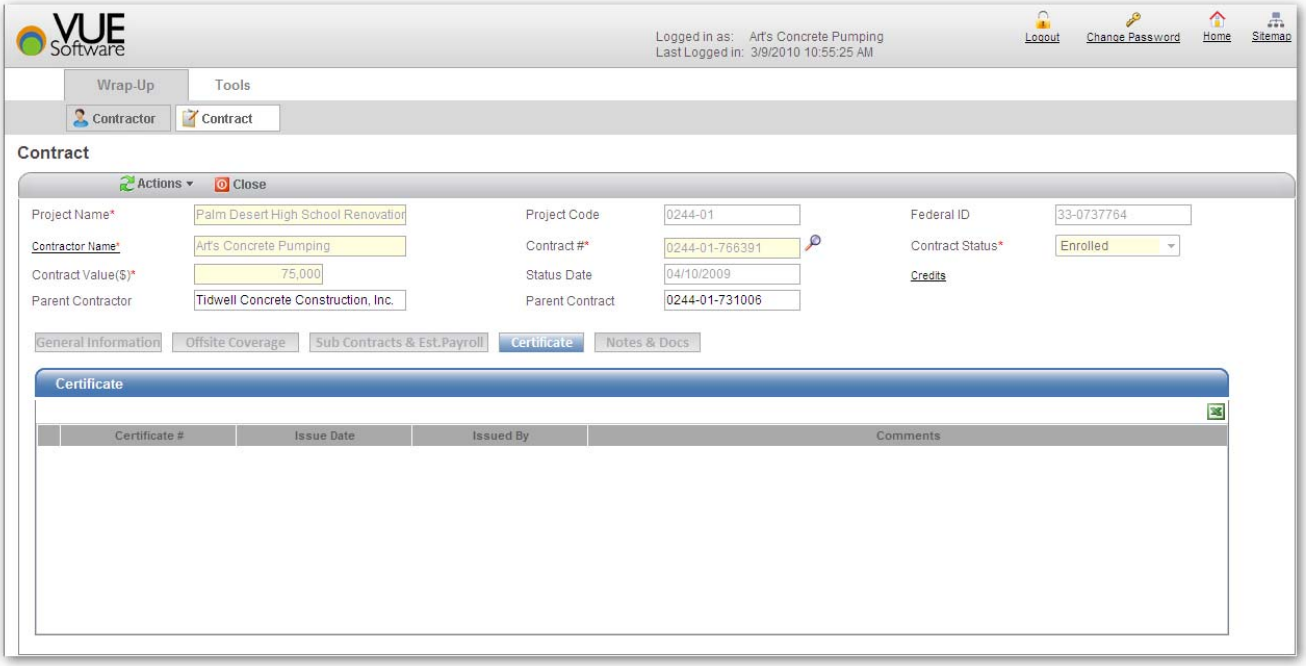
Navigation: User can navigate to this screen from Contract →Sub Contracts & Est. Payroll tab



- The above is the Estimated Payroll pop up screen that gets displayed in add/edit mode.
- Add/edit WC Class Code, WC Rate $100/Payroll, Man Hours and Payroll ($) if required. If your contract is Time and Material please enter zero for Man Hours and zero for Payroll, as a value must be entered into these fields.
- WC Premium ($) will automatically be displayed for the given values.
- Click on Save button to save the estimated payroll information.
- Click on Close button to close the screen. Repeat steps above to add more estimated payroll information/WC Class Codes.

CERTIFICATE SCREEN

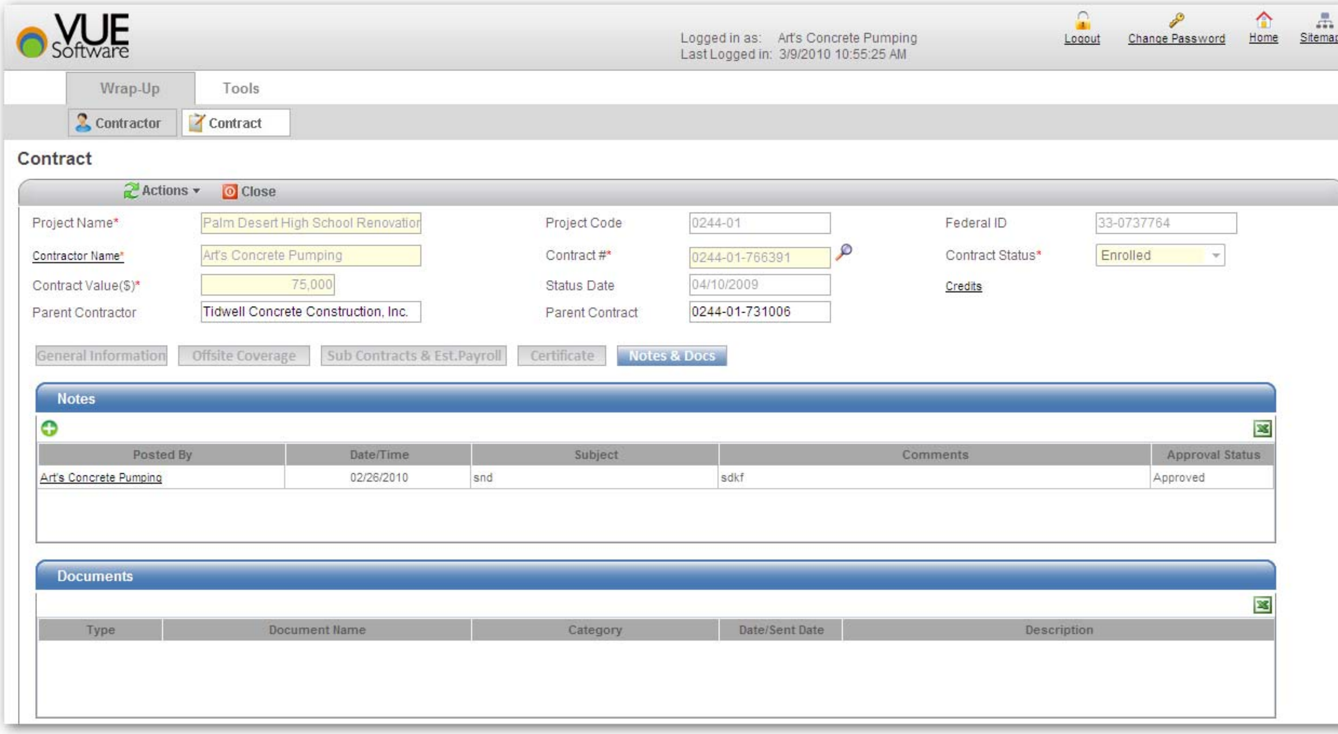
Navigation: User can navigate to this screen from Contract →Certificate tab.



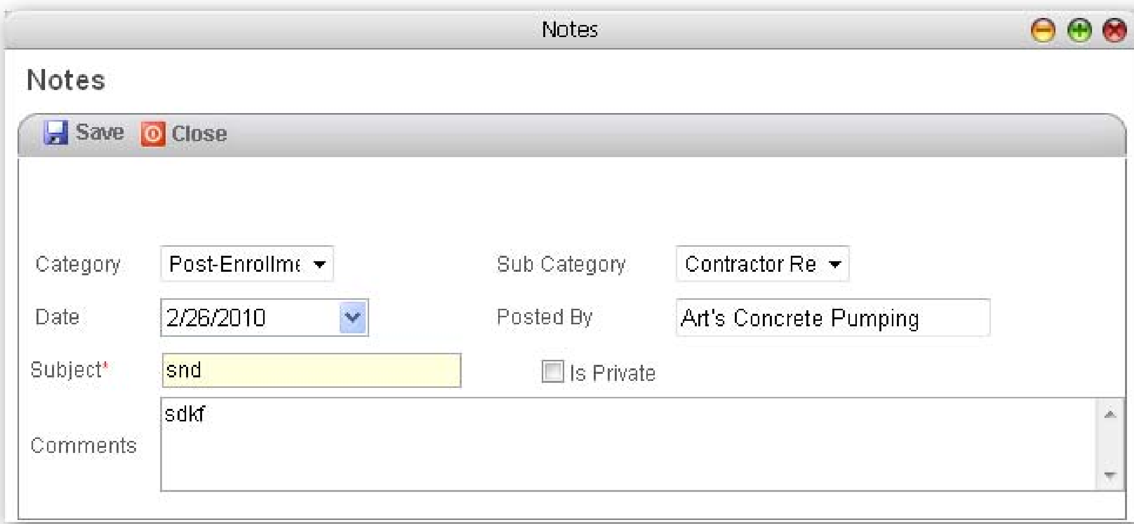
- The OCIP Certificates issued for the Contract will be displayed here.
- Certificate records are shown with Certificate #, Issue Date, Issued by and Comments.
- Click on Certificate # link to open the generated Certificate document.

NOTES AND DOCUMENT SCREEN

Navigation: User can navigate to this screen from Contract → Notes and Docs tab.



- The Notes and Documents related to the Contract are displayed in this tab.
- Click on '+' button in Notes section to add Notes. The following screen is displayed:



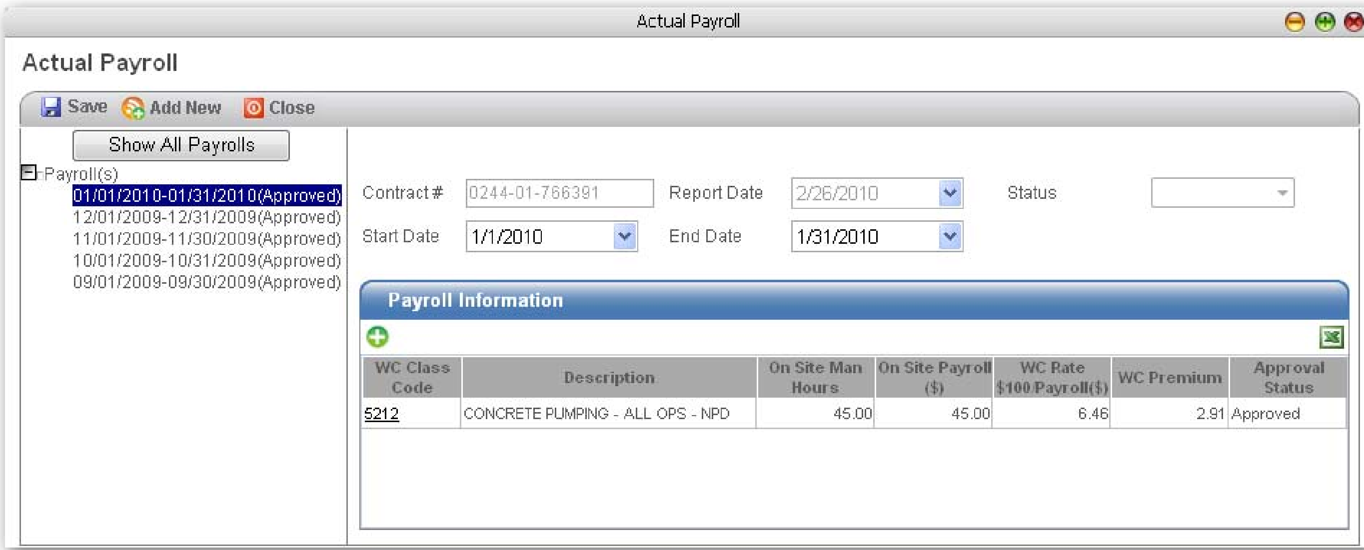
- Select Category, Sub category, Date and enter Posted By, Subject and Comments.
- Click on Save to save the notes added.
- Select a record from the grid and click on Document Name link to open the Document.

ACTION ITEMS MENU SCREEN

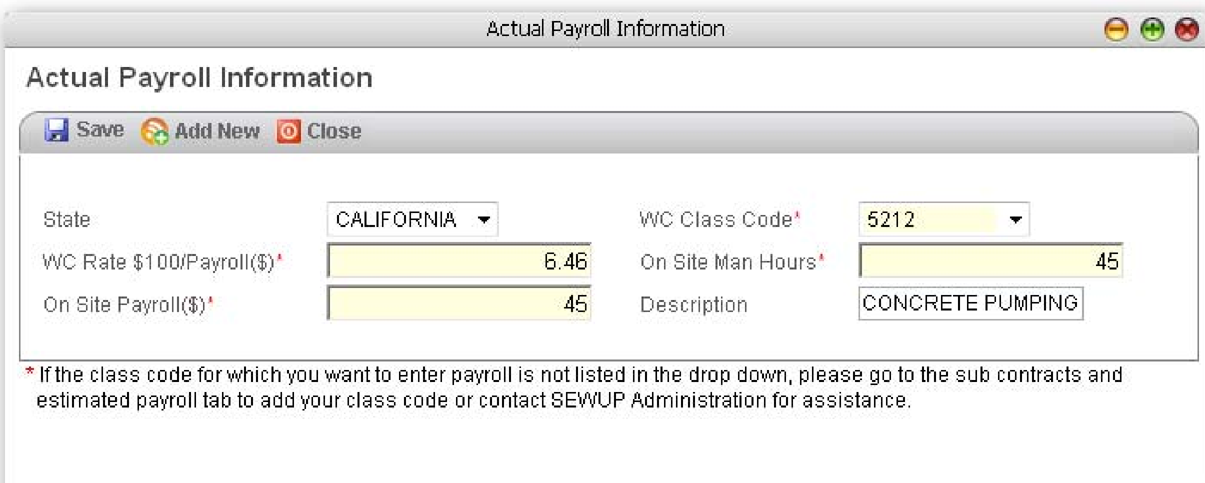
Contract Actions menu consists of two items. They are Actual Payroll and Credits. Respective pop up screen gets opened on selecting the items.

Actual Payroll

Navigation: User can navigate to this screen from Contract → Actions → Actual Payroll.



- This screen will display the Actual Payroll reported for the contract.
- User can add new payroll detail as well as view the existing payroll for the contract. This screen will display the WC Class Code, Descriptions, On Site Man Hours, On Site Payroll, WC Rate $100/Payroll, WC Premium, and Approval Status.
- Click on Add New button to add a New Payroll for the Contract.
- Enter Start Date and End Date
- Click on '+' button in Payroll Information grid. The following screen is opened.



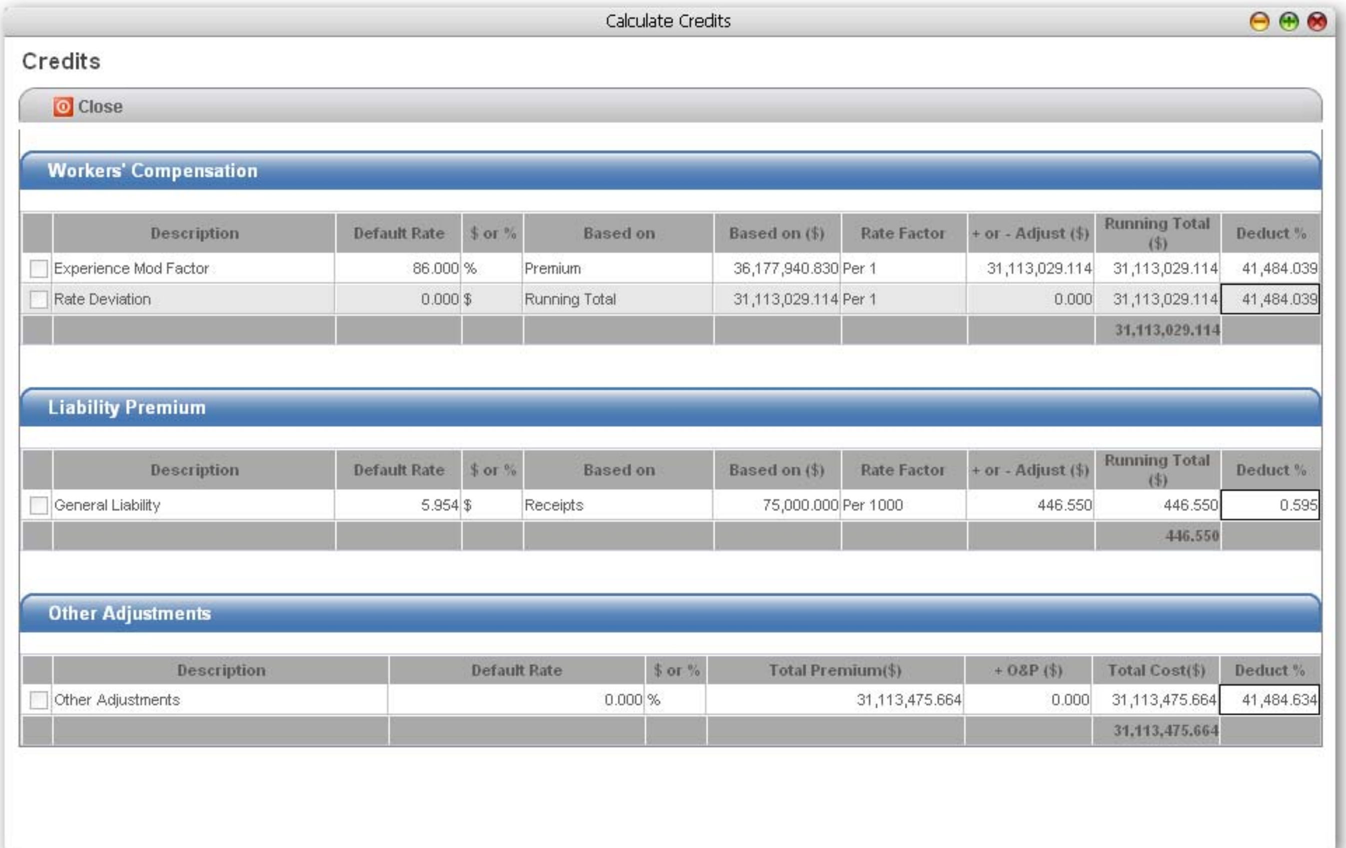
ACTION ITEMS MENU SCREEN

- Select State and WC Class Code. Enter WC Rate $100/Payroll ($), On site Man Hours and On site Payroll ($). The description gets displayed on selecting the WC Class Code.
- Click on Save button to save the Actual Payroll information.
- Click Close to close screen. Repeat steps above to add additional estimated payroll information.
- The Approval Status will be displayed as 'Pending' in grid column for the record.
- To see all existing payroll, click on the Payroll(s) in the list box on the left side as shown below. Select 'Show All Payroll' Button.

- Click on Close button to close the screen.

CALCULATE CREDITS SCREEN

Navigation: User can navigate to this screen from Contract → Actions → Credits.



Calculate Credits

Credits

Close

Workers' Compensation

	Description	Default Rate	$ or %	Based on	Based on ($)	Rate Factor	+ or - Adjust ($)	Running Total ($)	Deduct %
	Experience Mod Factor	86.000	%	Premium	36,177,940.830	Per 1	31,113,029.114	31,113,029.114	41,484.039
	Rate Deviation	0.000	$	Running Total	31,113,029.114	Per 1	0.000	31,113,029.114	41,484.039
								31,113,029.114	

Liability Premium

	Description	Default Rate	$ or %	Based on	Based on ($)	Rate Factor	+ or - Adjust ($)	Running Total ($)	Deduct %
	General Liability	5.954	$	Receipts	75,000.000	Per 1000	446.550	446.550	0.595
								446.550	

Other Adjustments

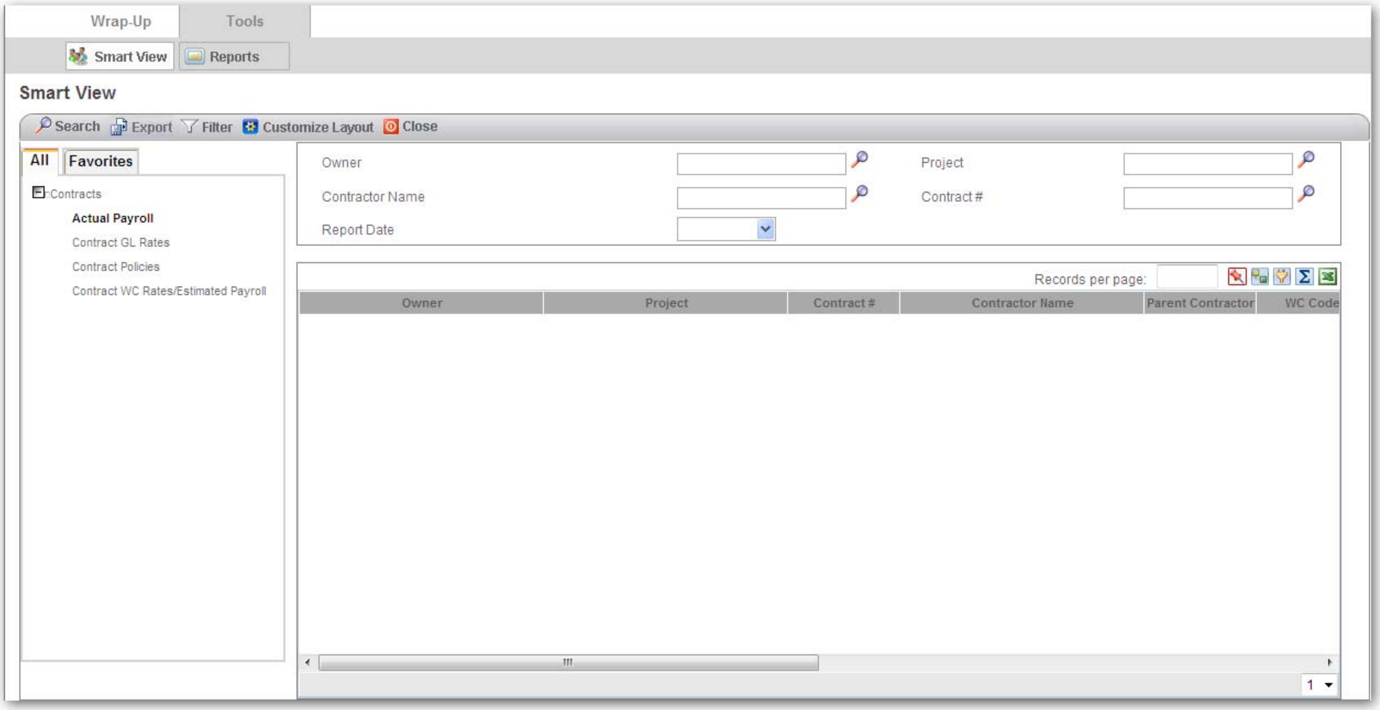
	Description	Default Rate	$ or %	Total Premium($)	+ O&P ($)	Total Cost($)	Deduct %
	Other Adjustments	0.000	%	31,113,475.664	0.000	31,113,475.664	41,484.634
						31,113,475.664	

- The Credits for the Contract will be displayed as read only in the above screen. This screen consists of three sections, namely Workers' Compensation, Liability Premium and Other Adjustments.
- The Premium Total will be displayed in the last row for each section.
- Contractor cannot edit Credit information.
- Click on Close button to close the screen.

SMART VIEW MODULE SCREEN

This component allows the users to Search and Retrieve information related to different entities.

Navigation: User can navigate to this screen from Tools → Smart View

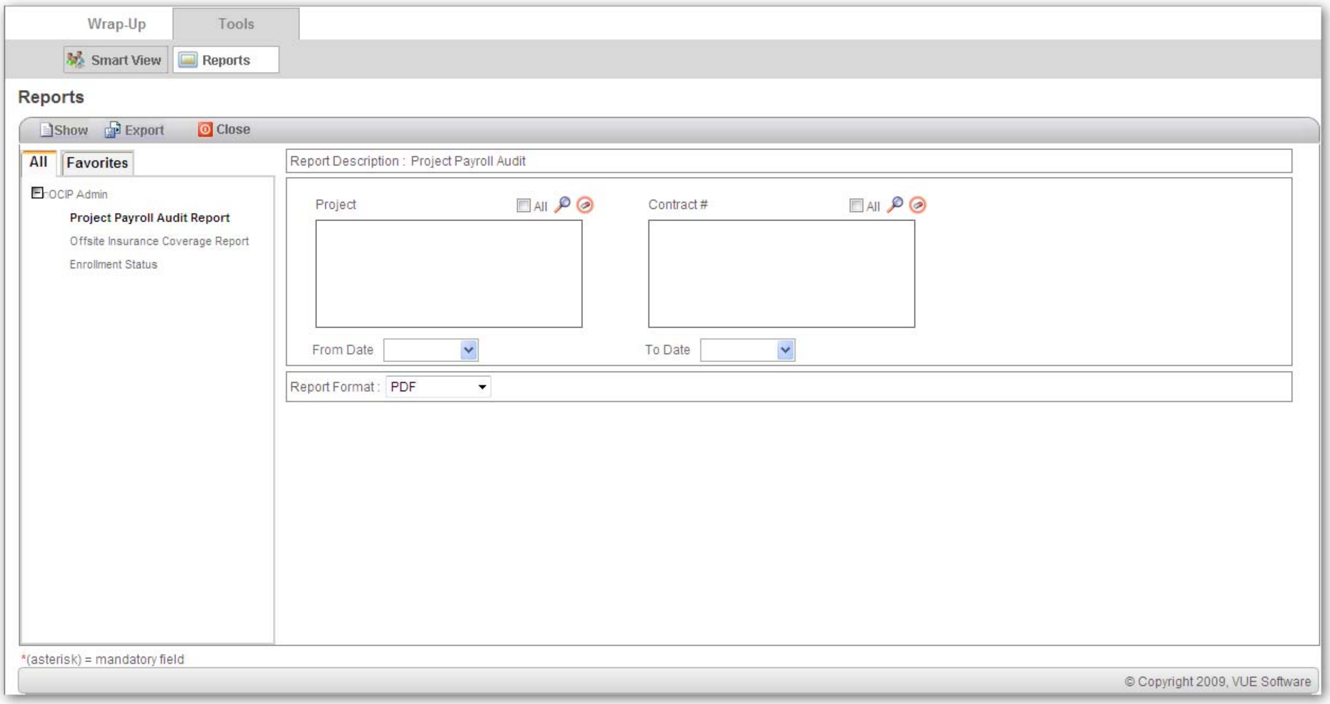


- The Smart View screen allows users to track the required information.
- From the right side grid, search a required tracking item by clicking the magnifying glass next to the field.
- Provide the required search criteria, click search, select the item you want and click the “Use” button.
- Click on ‘Search’ button to display the matching results in the grid. (It is not mandatory to give search criteria for all items).
- The grid data can be exported to an Excel sheet by clicking the Excel icon at right hand corner above grid.
- Click on Close button to close the screen.

REPORTS MODULE SCREEN

This component serves as a central location to maintain all reports. Data on these reports can be filtered/viewed/printed as per the requirements entered. To search for the report, select the report name under OCIP Admin. After selecting the report, enter the different search parameters. For some reports, mandatory parameters should be provided. Mandatory fields will be displayed in a different color.

Navigation: User can navigate to this screen from Tools → Reports



- The Reports screen allows the users to generate the required reports.
- From the left side grid, select a Report name.
- On selecting the Report name, respective search parameters are displayed.
- Click on the magnifying glass and enter the parameter search value. Click Search. Select the item you want and click the "Use" button.
- Click on 'Show' button to display the matching results in a Report format.
- Click on "Export" button to export the Report information to PDF.
- Click on Close button to close the screen.

LOG OUT INSTRUCTION SCREEN

Logging off	Click on “Logout” link on top right corner of the Home Page.  This will direct the user to the login screen.

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